



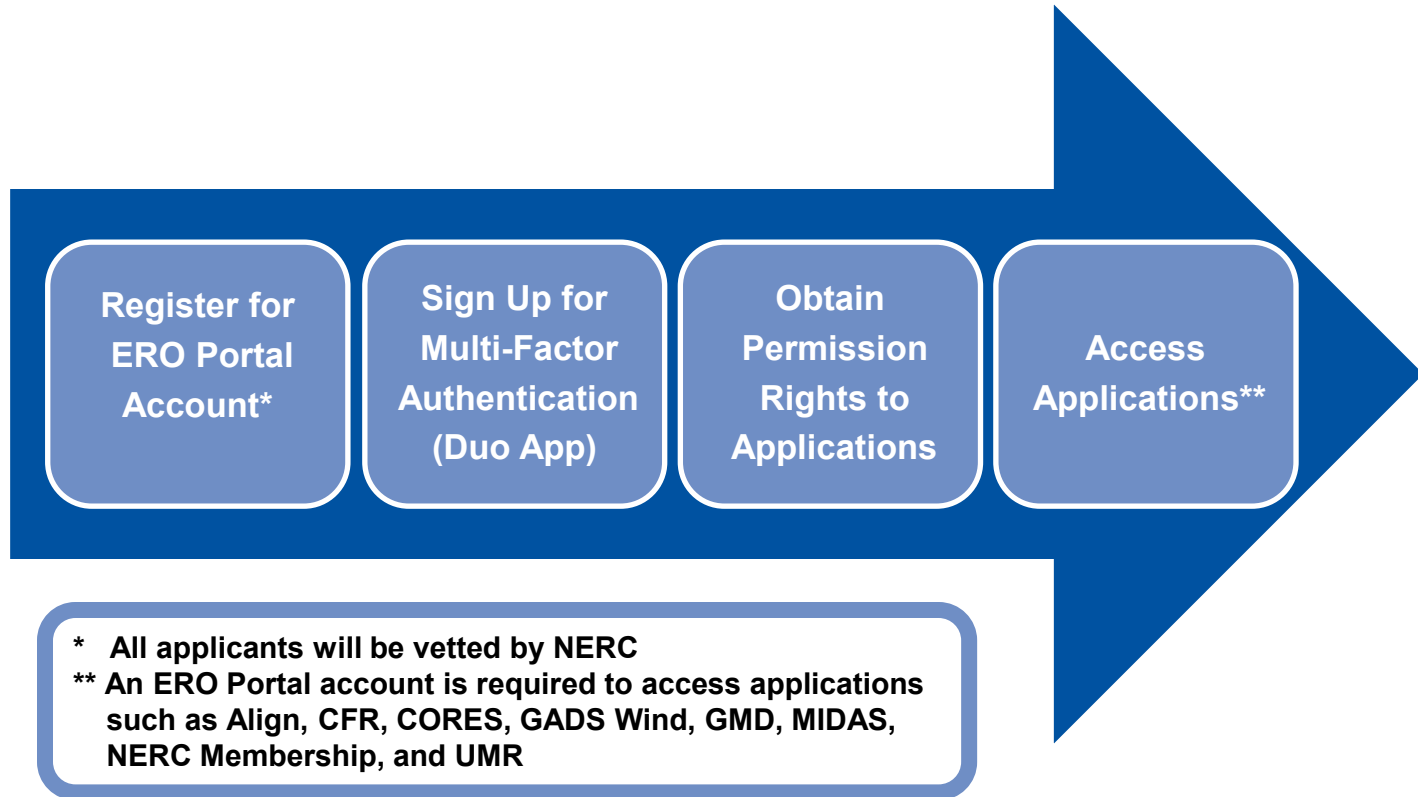
Registering for an ERO Portal and Accessing Applications within the ERO Portal

Abby Fellingner

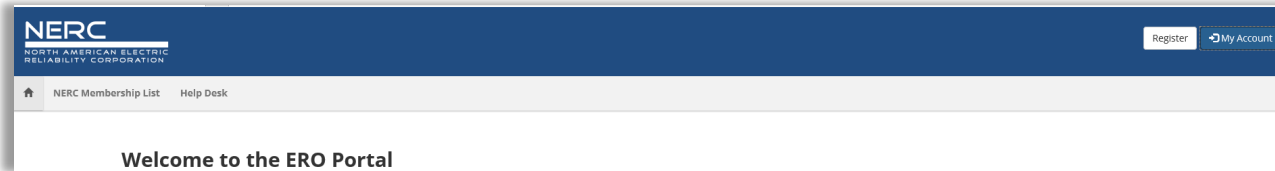
Manager, Registration and Certification Program

ERO PORTAL ACCOUNT AND MULTI-FACTOR AUTHENTICATION

ERO Portal Access



ERO Portal Account Required



To Set up an ERO Portal Account:

- Navigate to <https://eroportal.nerc.net>
- Select “Register” in the upper right-hand corner
- Complete the registration form and click “Submit”

To Verify an ERO Portal Account:

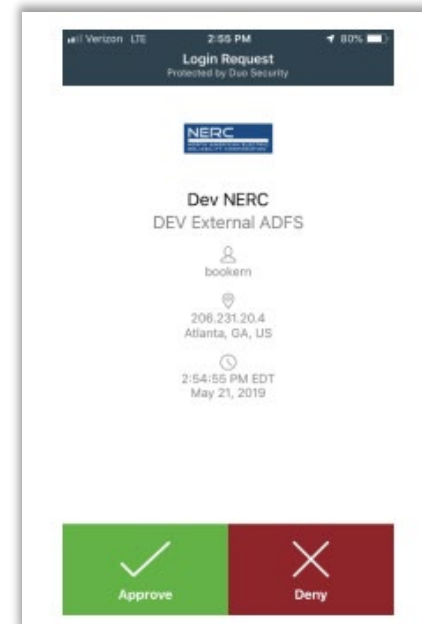
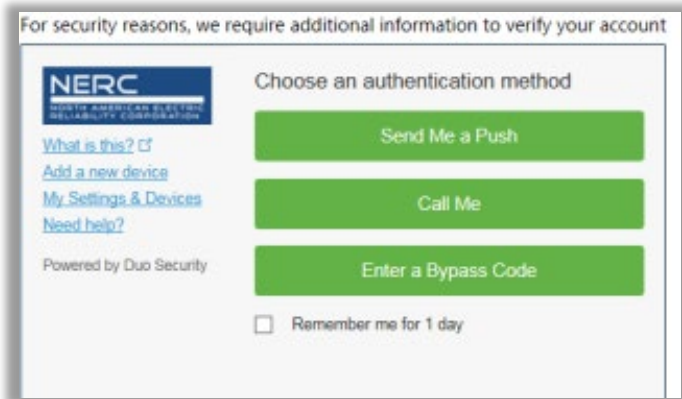
- Navigate to <https://eroportal.nerc.net>
- Select “My Account” in the upper right-hand corner
- Select “Sign In”
- Enter your credentials to confirm access to ERO

Set Up Multi-Factor Authentication (MFA)

A screenshot of the NERC MFA setup page. At the top left is the NERC logo (North American Electric Reliability Corporation). Below it, the text reads: "For security reasons, we require additional information to verify your account". The main content area is a white box with a grey border. On the left side of this box is the NERC logo and the text "Powered by Duo Security". In the center, there are four blue links: "What is this? ⓘ", "Add a new device", "My Settings & Devices", and "Need help?". On the right side, the heading "What type of device are you adding?" is followed by three radio button options: "Mobile phone RECOMMENDED" (selected), "Tablet (iPad, Nexus 7, etc.)", and "Landline". At the bottom right of the white box is a green "Continue" button.

Use Duo

Using Duo is Easy



ACCESS RIGHTS TO APPLICATIONS WITHIN THE ERO PORTAL

When to Request/Remove Permission Rights

When to change permission rights and contact roles

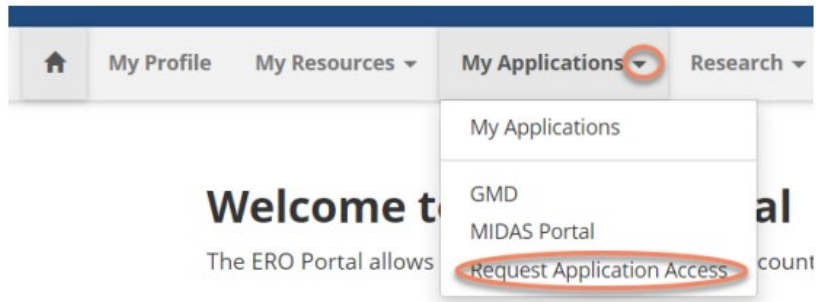
- Compliance management or entity ownership changes
- Role and responsibility changes within organization
- User/contact leaves the company

Actions to perform

- Request access or change permission rights in the ERO Portal
- Change contact roles in CORES
- Open a [Help Desk](#) ticket to “Deactivate” the ERO Portal account

Request Application Access

- Select **Request Application Access**
- Select **Create New Application Access request**



[Home](#) / [My Applications](#) / [Application Access Requests](#)

Application Access Requests

Below is the list of submitted application requests. To request access to an ERO Portal application, please use the link below to submit your access request information. Your request will be submitted to the corresponding entity administrator for approval.

[+ Create New Application Access Request](#)

Submit New Application Request

Request Application Access

[Back to Application Access Requests](#)

Request access to an ERO Portal application by using the form below. Here is a list of applications you may request access to:

Application	Role	Role Description
All Applications	Entity Administrator	This person has read and write access to GMD data, MIDAS data, and CORES data. In addition this person can make others the Entity Administrator and give others access to Align, GMD, MIDAS and CORES or remove access to those system from others.
ALIGN	Align Registered Entity Editor	This person can create and edit items in Align for the Entity he/she is associated with.
ALIGN	Align Registered Entity Reader	This person can view items in Align for the Entity he/she is associated with.
ALIGN	Align Registered Entity Submitter	This person can create/edit and submit items in Align for the Entity he/she is associated with, and submit evidence to the Secure Evidence Locker.
CORES	CORES User	This person can create/edit registration information (including CFRs/JROs) and run registration reports for the entity he/she is associated with
GMD	GMD User	This person can view and submit GMD data and run GMD reports for the entity he/she is associated with.
GMD	GMD Read-Only	This person can view GMD data and run GMD reports for the entity he/she is associated with.
MIDAS Portal	MIDAS User	This person can create/edit and submit MIDAS data and run MIDAS reports for the entity he/she is associated with.
MIDAS Portal	MIDAS Read-Only	This person can view MIDAS data and run MIDAS reports for the entity he/she is associated with.

Entity ▾

Requested Application Role ▾

Requester Comments

Enter the following:

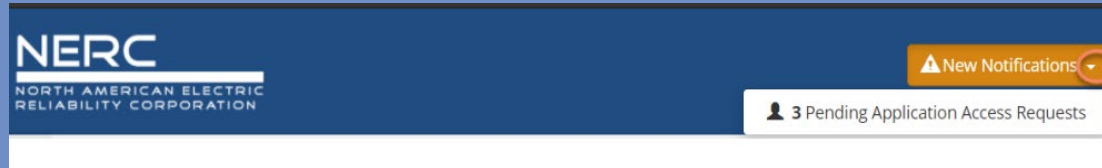
- NERC registered entity or a non-registered entity that has reporting obligations (MIDAS, GADS, etc.)
- Role Type
- Comments if applicable

Upon submission:

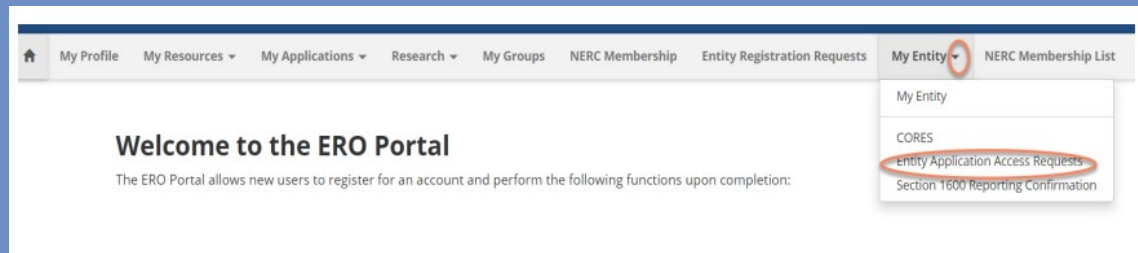
- Confirmation notification is sent to the applicant
- Review notification is sent to Entity Administrator(s)

Review Application Requests as Entity Admin

Option 1: Select **New Notifications** from the top menu option



Option 2: Select **My Entity** and **Entity Application Access Request**



Note: Only Entity Administrators may approve/request access requests

Process Application Requests as Entity Admin

Option to Approve/Reject Request

Application Access Requests

The following are the current application access requests for your registered entity. To approve or reject a request, select "Manage Access Request" from the item menu. When rejecting an access request, you must provide a reason for denying a request.

You can also view and manage all users for your entity on the [Manage Entity Page](#).

Requested By	Email Address	Phone	Requested Application Role	Requester Comments	Request Status	Created On ↑	
victor LT myers			CFR Administrator		Pending	6/24/2020 5:42 PM	▼
Kwame Jones			Entity Admin		Pending	5/27/2020 1:04 PM	▼

✓ Approve Request

✗ Reject Request

Review/Change Permissions as Entity Admin

Select Manage Entity Users or Manage Entity

The screenshot displays the NERC Customer Portal interface. The top navigation bar includes the NERC logo, a notification bell, a user profile dropdown for 'Abby Fellingner', and a home icon. The main navigation menu contains links for 'My Profile', 'My Resources', 'My Applications', 'Research', 'My Groups', 'Entity Registration Requests', 'My Entity', 'NERC Membership List', 'CIP Reports', 'Help Desk', and 'NERC Membership'. The 'My Entity' dropdown menu is open, showing options: 'My Entity', 'Manage Entity Users' (highlighted with a red box), 'CORES', 'Entity Application Access Requests', and 'Section 1600 Reporting Confirmation'. The main content area features a 'Welcome to the ERO Portal' message and three service tiles: 'SELF SERVICE ACCOUNT' (Change Password, Update Security Questions), 'VIEW MAILING LISTS & RESOURCES' (Access to Databases and Applications), and 'REQUEST ACCESS' (Get Access to Resources & Mailing Lists). A user profile dropdown on the right shows 'Abby Fellingner', 'Profile', 'Manage Entity' (highlighted with a red box), and 'Sign Out'.

Entity Administrator(s) can review and change who has access to the entity record

Review/Change Permissions as Entity Admin

There are three options under Manage Entity Users:

- To review Entity User(s) access permissions, click on **User** (listed in blue font)
- To grant access rights to other users, select **Add User**
- To remove access rights for a specific user, select **Remove User**
 - Note: The user will be removed instantly

The screenshot displays the 'Manage Entity Users' page for a specific entity. The entity name is 'Testing Company Name Update, LLC' and the NERC number is 'NCR55555'. Below this, there is a table of 'Entity Users' with one user listed: 'Abby Fellingner' from Austin, TX, with email 'abby.fellingner@texasre.org'. The 'Add User' button is located above the table, and the 'Remove User' button is located below the user's name in the 'Action' column. Both buttons are highlighted with red boxes in the original image.

User	City	State	Phone	E-mail Address	Action
Abby Fellingner	Austin	TX		abby.fellingner@texasre.org	Remove User

Edit Permission Rights as Entity Admin

Edit Permission Rights

- Select the **Edit** button
- Adjust User Permissions as needed

Manage User Permissions

NERC
NORTH AMERICAN ELECTRIC
RELIABILITY CORPORATION

Home / Manage Entity Users / Manage User Permissions

Manage User Permissions

Back to User Management

User Information

User	Username	Email
Abby Fellingner		abby.fellingner@texasre.org

Permissions User Has

[Edit](#)

Role	Entity	NERC Number (Portal User Parent Account)	Created On
Entity Admin	Testing Company Name Update, LLC	NCR5555	4/6/2021 2:39 PM
CORES User	Test Entity	VR000006	10/28/2020 11:30 PM

Home / Manage Entity Users / User Permissions

User Permissions

Manage User Permissions for: Abby Fellingner

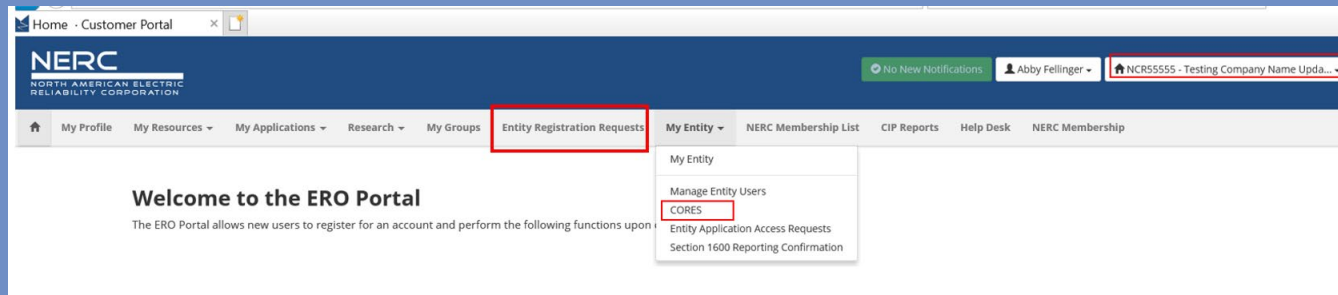
- CORES User
- GMD User
- GMD Read-Only
- MIDAS User
- MIDAS Read-Only
- Entity Admin
- Align Registered Entity Editor
- Align Registered Entity Reader
- Align Registered Entity Submitter

[Submit](#)

CORES

Accessing CORES

- Create a new registration application under **Entity Registration Requests**
- Review and update information for an existing registered entity under **CORES**



Submitting a New Registration Request in CORES

- CORES was created by moving core registration functions that were managed in OATI - webCDMS, Guidance – CITS and CRATS into a consolidated system
- CORES allows:
 - A consistent Regional Entity and registered entity process
 - The ability to import data elements into Align

Entity Name ■
Testing Company Name Update, LLC

New Name Pending Approval
New Testing Company Name Update, LLC

Acronym
TC2

Street 1 ■
2191 E Gregson Ave

NERC Number
NCR55555

Street 2

Phone
8018199405

City ■
Salt Lake City

Website
<http://097097>

State/Province ■
UT

Has a NERC-Led Panel Request been submitted?
 No Yes

Country ■
United States

ZIP/Postal Code ■
84109

✓	Basic Information
✓	Upstream Holding Companies
✓	Contact Roles
✓	Entity Scopes
✓	Functional Mapping
✓	Coordinated Oversight
✓	CFR
✓	JRO
✓	Comments and Attachments

Contacts in CORES

- Select Contact Roles
- Create or revise Contact Roles
 - Primary Compliance Contact (PCC), Primary Compliance Officer (PCO),
 - Alternate Compliance Contact (ACC), and Chief Executive Officer (CEO)

Home / CORES / Contacts

- This form is used for updating the contacts for your registered entity. The two required contacts for registration are Primary Compliance Contact and Primary Compliance Officer.
- If you would like to update personal information associated with your contact record (name spelling, email address, phone, address, etc.), please click this [link](#) to edit your Profile.
- If you would like to request access to an application or manage a request for access to an application, please click this [link](#) to manage application requests.
- If you would like to manage the permissions associated with your contact record or the permissions of other contacts associated with your entity, please click this [link](#) to manage entity user permissions.
- [Training Link](#)

Contact Roles

Active Contact Roles

[Create](#)

Contact ↑	Entity	Role Type	Username (Contact)	E-mail (Contact)	Name (Region)
Abby Fellingner	Testing Company Name Update, LLC	Primary Compliance Contact (PCC)		abby.fellinger@texasre.org	Texas RI

Inactive Contact Roles

Contact ↑	Entity	Role Type	E-mail (Contact)	Region	Modified On
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- ✓ Basic Information
- ✓ Upstream Holding Companies
- ✓ **Contact Roles**
- ✓ Entity Scopes
- ✓ Functional Mapping
- ✓ Coordinated Oversight
- ✓ CFR
- ✓ JRO
- ✓ Comments and Attachments

The PCC and PCO are required contact roles | The ACC and CEO roles are optional in CORES

Create Contact(s) in CORES

- The new contact must have an active ERO Portal account
- The previous PCC or PCO user role will be deactivated once a new PCC or PCO role is added to an entity record

Create

New Entity Registration Requests - Please use the lookup to add contact roles to your entity's registration.

Updating Contact Roles for a Registered Entity - Please use the lookup to add contact roles to your entity's registration. Please note - when adding a new Primary Compliance Contact (PCC) or Primary Compliance Officer (PCO) for an existing registration, the old PCC or PCO will automatically be deactivated. To "reactivate" a deactivated PCC or PCO, simply create a new PCC or PCO role. The deactivated roles will be shown in the deactivated view (My Entity).

Role Type * **1 - Select Role Type** (PCC, PCO, ACC, CEO)

Contact * **4 - Applicable name should manually populate**

Email Address Lookup * **2 - Enter applicable email address**

3 - Select Find Contact



Contact Role Assignments

Region * **5 - Select the applicable Regional Entity**

6 - Select Submit

Deactivate Contact(s) in CORES

Deactivate any ACC or CEO contact roles that are no longer applicable

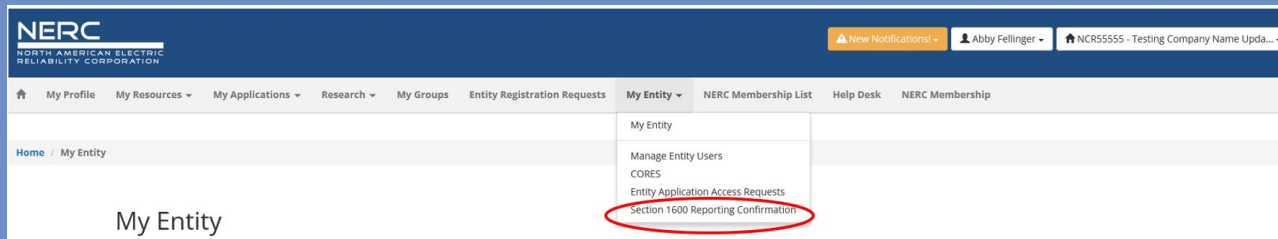
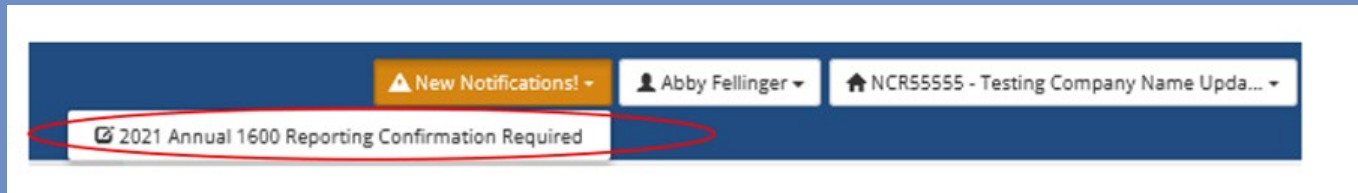
Role Type ↑	Username (Contact)	E-mail (Contact)	Name (Region)	Created On	
Alternate Compliance Contact (ACC)		kevin.koloini@nerc.net	WECC	4/22/2021 1:50 PM	 

ANNUAL 1600 REPORTING CONFIRMATION WITHIN THE ERO PORTAL

Section 1600 Reporting Confirmation

Annual 1600 Reporting Confirmation Notifications

- Implemented in Q4 2020



Section 1600 Reporting Confirmation

- Uses entity scopes to present current reporting obligations to the Entity Administrator(s)

Reporting Process in the ERO Portal

- Annual confirmation required by January 15
 - Review description of reporting criteria
 - Confirmation requested for each region in which entity has a reporting obligation
 - Entity Administrator(s) will be sent reminder emails for the next year's annual confirmation at the beginning of December

Reporting Applies to GMD and MIDAS

Section 1600 Reporting Confirmation Incomplete

Annual Section 1600 Reporting Confirmation

One or more functions (scopes) assigned to this entity apply to data reporting requirements in accordance with Section 1600 of NERC's Rules of Procedure. For each reporting requirement listed below, indicate whether the entity meets the reporting criteria. For clarification of reporting requirements, please contact your regional entity.

⚠ You have not confirmed your section 1600 reporting for the current year. Please complete the form below.

Reporting Applications

Reporting Year

Geomagnetic Disturbance (GMD)

Transmission Owners and Generator Owners that have GIC or Magnetometer devices or have GIC or Magnetometer event data for any GMD event occurring on or after May 1, 2013.

Reporting Obligations

Start Date	End Date	Region	Meets Criteria
12/26/2017		WECC	<input type="radio"/> Yes <input type="radio"/> No

Misoperations Information Data Analysis System (MIDAS)

Transmission Owners, Generator Owners or Distribution Providers.

Reporting Obligations

Start Date	End Date	Region	Meets Criteria
10/24/2019		RF	<input type="radio"/> Yes <input type="radio"/> No
12/26/2017		WECC	<input type="radio"/> Yes <input type="radio"/> No

Submit

[GMD Home Page](#) | [MIDAS Home Page](#)

Section 1600 Reporting Confirmation Complete

Annual Section 1600 Reporting Confirmation

One or more functions (scopes) assigned to this entity apply to data reporting requirements in accordance with Section 1600 of NERC's Rules of Procedure. For each reporting requirement listed reporting criteria. For clarification of reporting requirements, please contact your regional entity.

Your section 1600 reporting obligations have been confirmed for the reporting year.

Reporting Applications

Reporting Year

Geomagnetic Disturbance (GMD)

Transmission Owners and Generator Owners that have GIC or Magnetometer devices or have GIC or Magnetometer event data for any GMD event occurring on or after May 1, 2013.

Reporting Obligations

Start Date	End Date	Region	Meets Criteria
12/26/2017		WECC	<input checked="" type="radio"/> Yes <input type="radio"/> No

Misoperations Information Data Analysis System (MIDAS)

Transmission Owners, Generator Owners or Distribution Providers.

Reporting Obligations

Start Date	End Date	Region	Meets Criteria
10/24/2019		RF	<input type="radio"/> Yes <input checked="" type="radio"/> No
12/26/2017		WECC	<input checked="" type="radio"/> Yes <input type="radio"/> No

Submit

Resources

[ERO Portal End User Guide](#) | [ERO Portal Videos](#)

[NERC Multi-Factor Authentication Quick Start Guide](#)

[Registered Entity Request Access Process](#)

[NERC Systems Training](#)

[CORES End User Guide](#)

[NERC Help Desk](#)

Contact Information

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